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## Supporter Donation System Quick Tips Users

Every person using the system must sign in with a User Name and Password. Each person should have their own user name and password because each time someone does something in the program it is recorded and it should be recorded under the person's name that actually performed the task.

The General tab allows you to Add, Delete Users and Change Passwords. Each User must have a first and last name, and a password. The Prompt to Save Query in Supporter Selection Engine checkbox will prompt you to save your query every time you make a change in the Supporter Selection Engine. Most often this would be unchecked.

Users can also be Solicitors in the database and you can set Advance warnings and Ignore options here for solicitations.

The Security tab determines which parts of the Supporter Donation System can be viewed, added to, changed or deleted. Click on each item on the left to show the associated security features on the right and choose which items to turn on or off. Note: Any changes you make to user permissions will not take effect until the next time that user enters the program!

The User Events tab shows what events occurred for the user chosen in the Find Login Name. EXAMPLES:  
01/5/2019 9:00am Supporter Donation System entered  
01/5/2019 9:05am Supporter Added  
01/5/2019 9:20am Supporter Donation System exited

The Purge button allows you to purge old User Events – it is recommended to perform this task about every 3-4 months as this list can grow quite long. Simply click on the Purge button choose your date and click on the purge button again. NOTE: you can setup specific events that you don't want to purge by clicking on the Set Up Events to Purge button and checking them off in the list.

The User Messages tab sends a message to other users when certain events occur. EXAMPLES:  
01/5/2019 Enter Supporter Donation System      User Name      Read check  
01/5/2019 Add new Supporter                      User Name      Read check

The User Message Configuration tab lists all Available Messages and allows the Supervisor to choose who will see which messages. IE: The supervisor may want to receive a message when the Supporter Donation System is entered or exited or if a User tries to delete a Supporter.

The Software License tab explains our license policy.

Steps for adding users:

1. Add a new user
2. Click on the Security tab
3. Click on each line item on the left side of the Security tab and choose which items you want the new user to view, add/edit or delete or;
4. Use the Copy Security Settings button to copy the same set of Security options from one person to another
5. Set up the User Messages as needed